Importing and Exporting Overview

The data you store in Legrand CRM is by no means stored in an isolated form. Our software can import and export that data through a wide variety of means, making it easy for you to bring in company and contact information from other information management packages, and to export that data for merging and so on.

- **Microsoft Outlook** - Legrand CRM integrates very tightly with Outlook. You can bi-directionally transfer email, Contacts, Calendar Events and Tasks from Outlook.
- **Microsoft Excel** - You can export data directly to an Excel spreadsheet using the Export List in the right button menu selection.
- **Accounting data transfer** - Financial information from accounting packages can be imported into each company record, providing you with key financial data such as sales made and payments outstanding. You can learn more about this in Accounting System Interaction.
- **CSV Import** - This is an extremely flexible and common data format that works with nearly all other packages. Its flexibility also introduces some complexity, although not too much, as you'll see below. An important piece of information to keep in mind is that your spreadsheet of data should contain a column for each field being populated in the Legrand CRM database. For example "Mr Jay Jones" is stored in 3 separate fields in Legrand CRM therefore the spreadsheet should have a column for "Mr", a column for "Jay" and a column for "Jones". This way the import mapping step allows you to map each one of those columns to a field in Legrand CRM.

Each method has its own advantages, so let's take a closer look at each.

Note: Legrand CRM's import wizard does not support file paths that include an apostrophe.

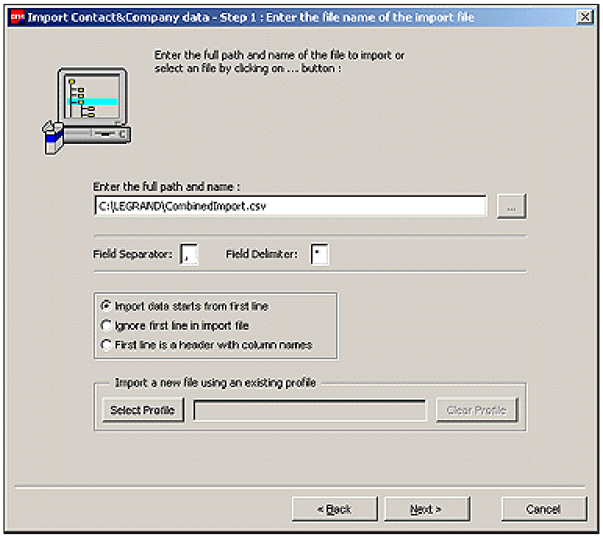
Importing CSV Files

A CSV or comma-separated-value file is a text file readable by practically any word processor, spreadsheet and most other types of applications. It is built just like the columns in a spreadsheet. The only real difference is that a CSV file uses commas instead of columns to separate each piece of data. It's a simple as that.

Many other applications understand CSV. For example, Adobe® Pagemaker® 7, a business publishing package, can perform a mail-merge with CSV files. CSV format is understood by an enormous amount of other software, including most information management systems. This means that if you do have any company and contact data stored in another system, you should be able to import it into Legrand CRM with ease.

Start by generating the CSV file using your other software. If you are given the option, make sure you export the field or column names as the first record. That will make it much easier to match up with the field names used by Legrand CRM. Once you've done that, within Legrand CRM open the **File** menu and select **Import.** If the file contains both company and contact data in each record, select **Contact & Company data from file.** If the file contains just company data, select **Company data from file.** If you don't know, don't worry; just select **Contact & Company data from file** and we'll confirm it in a moment.

Step 1: General configuRation



Above: Setting up the basic import configuration.

The figure above shows the window you'll see at Step 1. This window sets a number of general configuration options:

1. Click the ellipsis ... to the right of the file name field and locate and select the CSV file you exported.

2. Just below this field you'll see two entries for the **Field Separator** and **Field Delimiter** boxes. Each piece of data in a CSV file is usually separated from the next by a comma. That's the field separator. Each piece of data is also enclosed in quotes. That's known as the delimiter. You can change these values if the exported CSV file uses something other than commas and quotes, but in almost all cases that shouldn't prove necessary.

3. Most CSV files export the field or column names as the first record in the file, providing a reference to the contents of the columns in all the remaining records. Others just start with the actual data straight away, while still some others include general information in the first line that needs to be discarded. Legrand CRM needs to know where in the file it can start reading real data. If the data starts straight away, select **Import data starts from first line.** If the first line has information you don't want to import, select **Ignore first line in import file.** If the data includes column header information in the first line (this is the preferable type), select **First line is a header with column names**.

4. Over the next few steps you will need to match up the names of the data columns contained in the imported file with those in Legrand CRM. Profiles save this information for you, making them particularly useful if you regularly import CSV files that always have the same format. Use **Select Profile** to choose a profile you have previously saved. If you do select a profile and change your mind about using it, click **Clear Profile** to return to the defaults.

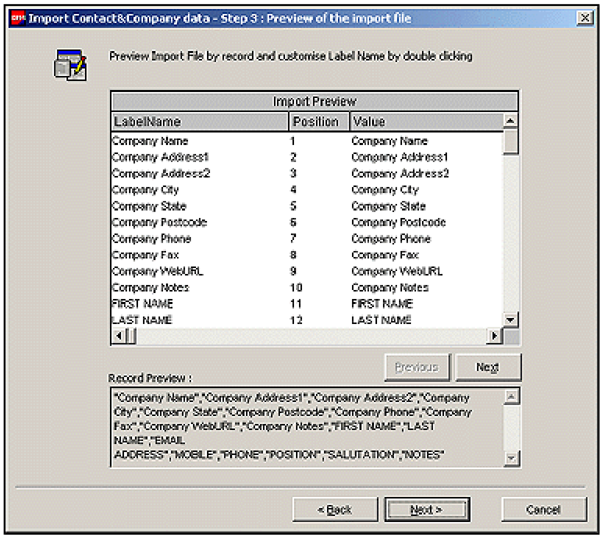
5. Click **Next** when you are ready to move to the next step.

How can I tell which separation and delimiting method my CSV file uses?
Just open the file in any text-editing or word-processing package. A standard CSV file uses a format that looks like the following: "FirstName", "LastName", "AddressLine1". If you see something other than commas and quotes, put those into the separator and delimiter settings provided in Legrand CRM.

Step 2: Previewing the import file

The next figure shows the data preview pane. Use the Import Preview in the upper section of this window to ensure the labels on the left adequately describe the purpose of each field on the right. For example, if the file you are importing doesn't include column labels, you should change each of the Label Names to something other than the default FIELD001, FIELD002, etc.

The record preview in the lower section shows the actual data in the file one record at a time. Now, here's a trick. If you see what looks like actual field names in the Record Preview, rather than



Above: Make sure the labels make sense of the data.

hard data, your file does include all the column names required, so click **< Back**, select **First Line is a header with column names** and click **Next >.** This time around you should find all the label names already set up for you.

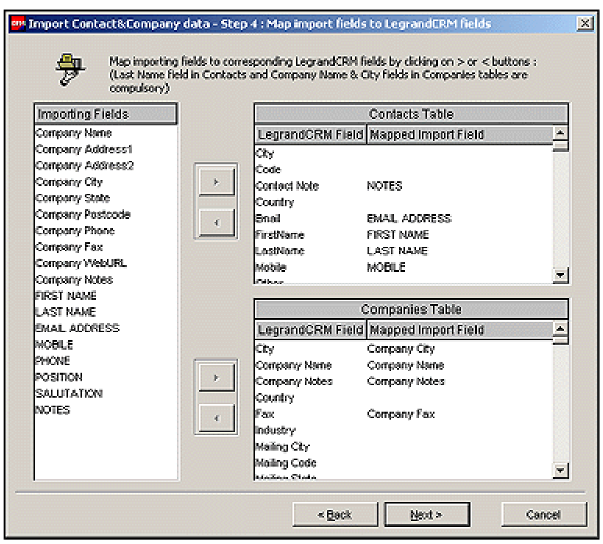
If not, double-click each field name to change the label. You'll need to match these labels in the next step with Legrand's fields, so make them obvious. For example, FirstName, LastName, Street, City, Phone, Fax, Notes. If you are importing both company and contact data you will need to do the same for all the company details.

Use the **Next** and **Previous** buttons to step through each record in the file. If the data seems to match the field names, you're ready to click the **Next >** button to move on.

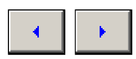
If you chose to only import company data and the preview pane shows both company and contact data, and you want to import those contacts you should click **Cancel** and restart the process, choosing **Contact & Company data from file** from the **File, Import** menu.

Step 3: Mapping import fields

The figure below shows the field mapping when importing both contact and company data. If you are only importing company data you'll see a slightly simpler screen. The list of importing fields on the left is taken from the column headers that you set up in Step 2. You will need to match each of these fields (or at a bare minimum, the last name for contacts and the company name, city and postcode for companies) to their counterparts in either one or both lists of fields on the right. (If you are only importing company data you'll see just the one list of fields on the right.)



Above: Map all the relevant import fields on the left to their counterparts on the right.


To match these fields simply select one of them on the left, click on its counterpart in the appropriate table on the right, and then click the right-facing blue triangle beside that list of fields. If you make a mistake, select the field on the right and click the left-facing triangle.

When you have finished click **Next >**.

Step 4: Import rules

Now you need to decide what you'll do if any of the imported data matches any of the company and contact records already stored in Legrand CRM.

For the upper selection - If the company data you are importing is newer than the company data you already have, you may want to select **Overwrite Company Details.** Otherwise select **Do NOT overwrite Company Details**.

For the lower selection - If the combined company and contact data matches an existing record and the data you are importing is newer, select **Import matching record.** Otherwise select **Do NOT import matching record**.

When ready click **Next >**.

Step 5: Saving as a profile

Legrand CRM can save all of your import settings as a profile. If you regularly import data in the same format, saving your settings as a profile will make it easy to reimport that data later. To save the profile select **Yes, save as** and then type in a profile name.

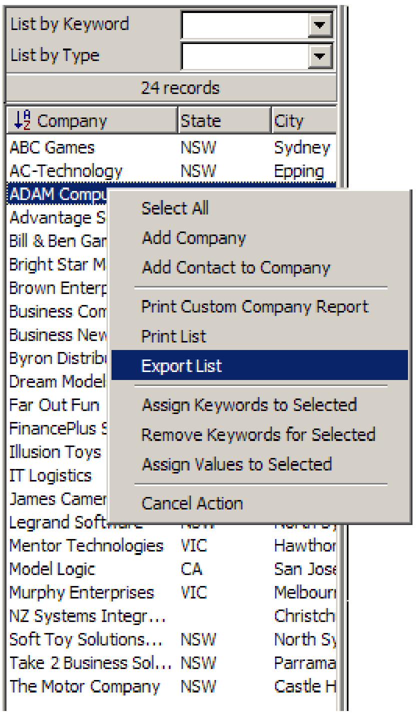
Click **Next >** one more time.

Step 6: You're finished!

Congratulations! Legrand CRM is now ready to import the data. Click on the **Finish** button to set it in motion.

Online Help

Exporting Data to Microsoft Excel



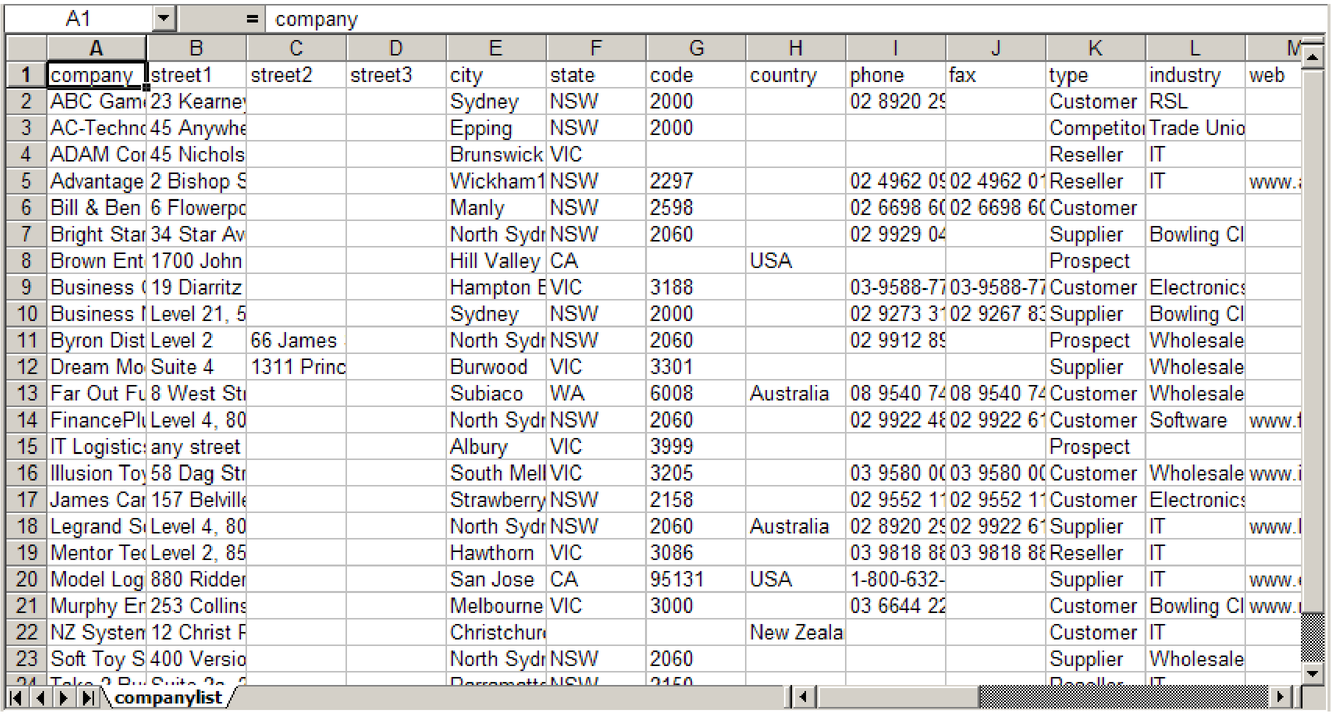
Any list view in Legrand CRM allows items to be exported directly to an Excel spreadsheet. Use the right mouse button menu to select **Export List** selection. This puts the data in a format that is then very easy to use in a mail-merge, or to copy into other data management systems.

This exporting method always exports all of the items currently listed, so you should filter the list first if you only want to export a subset. For example, to export all companies click the **Companies** button in the Navigation bar and choose **All Companies.** Right-click on any company with the mouse and choose **Export List** (see adjacent figure).

Left: Exporting Companies to Excel.

If you have Microsoft Excel installed on your computer you will shortly see a screen similar to that shown here. This contains all of the data stored in each of the company records

.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	company	street1	street2	street3	city	state	code	country	phone	fax	type	industry	web
2	ABC Gam	23 Kearne			Sydney	NSW	2000		02 8920 2		Customer	RSL	
3	AC-Techn	45 Anywhe			Epping	NSW	2000				Competito	Trade Unio	
4	ADAM Co	45 Nichols			Brunswick	VIC					Reseller	IT	
5	Advantage	2 Bishop S			Wickham1	NSW	2297		02 4962 0	02 4962 0	Reseller	IT	www.
6	Bill & Ben	6 Flowerp			Manly	NSW	2598		02 6698 6	02 6698 6	Customer		
7	Bright Sta	34 Star Av			North Syd	NSW	2060		02 9929 0		Supplier	Bowling Cl	
8	Brown Ent	1700 John			Hill Valley	CA		USA			Prospect		
9	Business	19 Diarritz			Hampton E	VIC	3188		03-9588-7	03-9588-7	Customer	Electronic	
10	Business	Level 21, 5			Sydney	NSW	2000		02 9273 3	02 9267 8	Supplier	Bowling Cl	
11	Byron Dist	Level 2	66 James		North Syd	NSW	2060		02 9912 8		Prospect	Wholesale	
12	Dream Mo	Suite 4	1311 Princ		Burwood	VIC	3301				Supplier	Wholesale	
13	Far Out F	8 West St			Subiaco	WA	6008	Australia	08 9540 7	08 9540 7	Customer	Wholesale	
14	FinancePl	Level 4, 80			North Syd	NSW	2060		02 9922 4	02 9922 6	Customer	Software	www.f
15	IT Logistic	any street			Albury	VIC	3999				Prospect		
16	Illusion To	58 Dag Str			South Mel	VIC	3205		03 9580 0	03 9580 0	Customer	Wholesale	www.i
17	James Ca	157 Belvill			Strawberry	NSW	2158		02 9552 1	02 9552 1	Customer	Electronic	
18	Legrand S	Level 4, 80			North Syd	NSW	2060	Australia	02 8920 2	02 9922 6	Supplier	IT	www.l
19	Mentor Te	Level 2, 85			Hawthorn	VIC	3086		03 9818 8	03 9818 8	Reseller	IT	
20	Model Log	880 Ridder			San Jose	CA	95131	USA	1-800-632-		Supplier	IT	www.
21	Murphy Er	253 Collins			Melbourne	VIC	3000		03 6644 2		Customer	Bowling Cl	www.
22	NZ Systen	12 Christ F			Christchur			New Zeala			Customer	IT	
23	Soft Toy S	400 Versio			North Syd	NSW	2060				Supplier	Wholesale	

companylist

Above: Data exported to Excel.

As mentioned earlier, Legrand CRM can also export contacts, opportunities and marketing entries. To export contacts to Excel click the **Contacts** button in the Navigation bar. Use the filtering tools and the WorkList to build up the list of contacts you wish to export and then right-click on any contact and select **Export List.**

Legrand CRM offers you a list of fields available for export. These include postal and street address, phone details, email address and numerous user-defined fields. Simply check the boxes next to the fields you wish to export and then click OK. After a few moments Excel will open and display the relevant data, as shown below.

Above: Contacts Data exported to Excel.

The upper row of the spreadsheet contains the field names. This makes it easy for you to insert the codes into Word documents and other publications. The list provides the basic information required for a mail-merge and includes the contact's name, the company they are associated with, and the company's full mailing address.

The actual Excel files Legrand CRM creates are named after the list. For example, ***contactlist.xls***, ***companylist.xls***, ***opportunities.xls*** and ***marketingcampaigns.xls***. These are saved to the main Legrand folder (usually **C:*LegrandCRM***) in a subfolder called ***Excel***. You can use this file directly with Word's mail-merge facility, or even import it into Microsoft Access to create another quick and easy database.

Legrand CRM Software Online Help

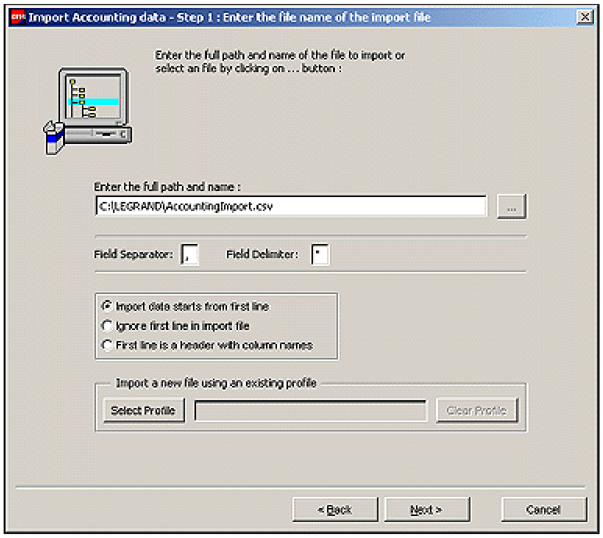
Importing a Generic Accounting File

If you can export data from your accounting package to a CSV file, you'll find the steps to import that data very similar to those described under Importing CSV Files. Just follow the steps 1 to 5 below to do so. You can match a company to a record stored in a CSV file through a minimum of matching the company's name and its account code.

Many accounting packages can export data in a CSV or comma-separated-value file format. You don't need to export all your accounting data to make use of the basic information in Legrand CRM. In fact, the only information Legrand CRM wants to see is the company name, and account code, the balances for 30, 60 and 90-plus days, and sales for this year, last year, this month and last month. Not even all of this data is required, but if you can extract it from your accounting system, Legrand CRM can use it.

Begin by generating the CSV file using your accounting package. If you are given the option, make sure you export the field or column names as the first record. That will make it much easier to match up with the field names used by Legrand CRM. Once you've done that, within Legrand CRM open the **File** menu, select **Import, Accounting Data** and choose **Generic import from file.** Then follow these steps.

Step 1: General configuation



Left: Setting up the basic import configuration.

The above figure shows the window you'll see at Step 1. This window sets a number of general configuration options:

1. Click the ellipsis  to the right of the file name field and locate and select the CSV file you exported.

2. Just below this field you'll see two entries for the **Field Separator** and **Field Delimiter** boxes. Each piece of data in a CSV file is usually separated from the next by a comma. That's the field separator. Each piece of data is also enclosed in quotes. That's known as the delimiter. You can change these values if the exported CSV file uses something other than commas and quotes, but in almost all cases that shouldn't prove necessary.

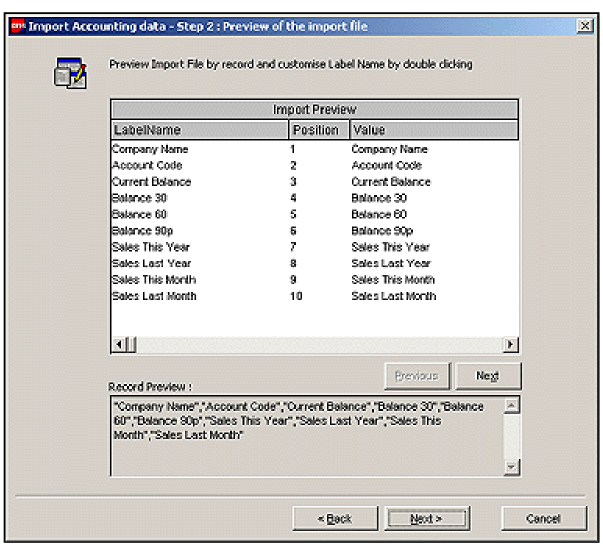
3. Most CSV files export the field or column names as the first record in the file, providing a reference to the contents of the columns in all the remaining records. Others just start with the actual data straight away, while still some others include general information in the first line that needs to be discarded. Legrand CRM needs to know where in the file it can start reading real data. If the data starts straight away, select **Import data starts from first line.** If the first line has information you don't want to import, select **Ignore first line in import file.** If the data includes column header information in the first line (this is the preferable type), select **First line is a header with column names**.

4. Over the next few steps you will need to match up the names of the data columns contained in the imported file with those in Legrand CRM. Profiles save this information for you, making them particularly useful if you regularly import CSV files that always have the same format. Use **Select Profile** to choose a profile you have previously saved. If you do select a profile and change your mind about using it, click **Clear Profile** to return to the defaults.

5. Click **Next** when you are ready to move to the next step.

Step 2: Previewing the import file

The figure below shows the data preview pane. Use the Import Preview in the upper section of this window to ensure the labels on the left adequately describe the purpose of each field on the right. For example, if the file you are importing doesn't include column labels, you should change each of the Label Names to something other than the default FIELD001, FIELD002 and so on.



Left: Make sure the labels make sense of the data.

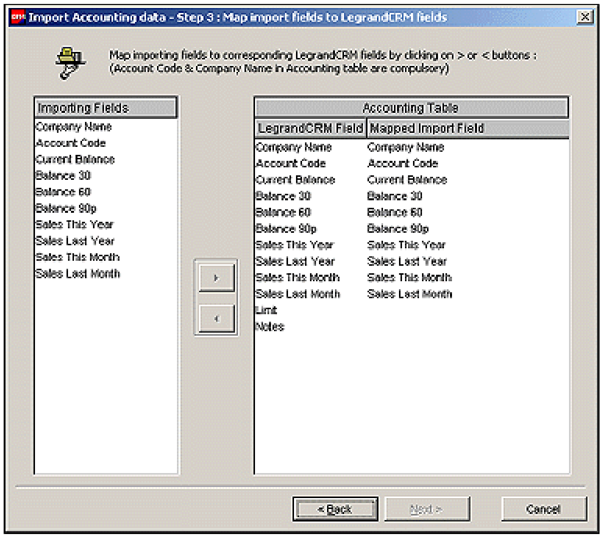
The record preview in the lower section shows the actual data in the file one record at a time. Now, here's a trick. If you see what looks like actual field names in the Record Preview, rather than hard data, your file does include all the column names required, so click **< Back**, select **First Line is a header with column names** and click **Next >.** This time around you should find all the label names already set up for you.

If not, double-click each field name to change the label. You'll need to match these labels in the next step with Legrand's fields, so make them obvious. For example, Company Name, Account Code, Current Balance, and so on. If you are importing both company and contact data you will need to do the same for all the company details.

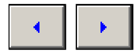
Use the **Next** and **Previous** buttons to step through each record in the file. If the data seems to match the field names, you're ready to click the **Next >** button to move on.

Step 3: Mapping import fields

The next figure shows the field mapping that takes place. The list of importing fields on the left is taken from the column headers that you set up in Step 2. You will need to match each of these fields (or at a bare minimum, the company name and account code) to their counterparts in either one or both lists of fields on the right.



Left: Map all the relevant import fields on the left to their counterparts on the right.



To match these fields simply select one of them on the left, click on its counterpart in the appropriate table on the right, and then click the right-facing blue triangle beside that list of fields. If you make a mistake, select the field on the right and click the left-facing triangle.

When you have finished click **Next >**.

Step 4 Saving as a profile

Legrand CRM can save all of your import settings as a profile. If you regularly import data in the same format, saving your settings as a profile will make it easy to reimport that data later. To save the profile select **Yes, save as** and then type in a profile name.

Click **Next >** one more time.

Step 5: You're finished!

Click on the **Finish** button to import the data.